Presentation to

Digital Equipment Company Ltd.

22 April 1992

DEC Park
Reading

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Piccadilly House, 33/37 Regent Street, London SW1Y 4NF, England — Tel. (071) 493-9335
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Environmental Services

A U.K.-Focused Update

E-CS-73

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Environmental Services

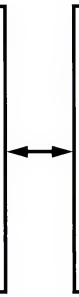
Key Findings

- Equipment vendor portion of U.K. market growing at a 12% CAGR
- Integrating systems and workplace technology is key driving force

Competitive Environment

Fragmented Market

- Equipment vendors
- Independent vendors
- Building/construction companies



- Technology driven
- Business driven
- Non-computer elements

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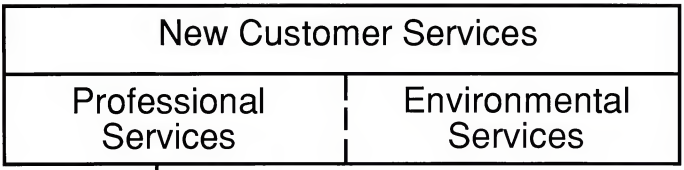
Environmental Services

Key Findings

- Need for vendor service not identified by 45% of users
- Market fragmentation is a key issue

Market Segmentation



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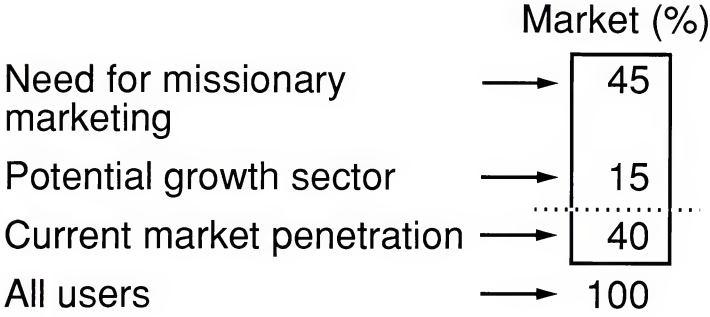
Market Challenges



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Environmental Services

Market Drivers

- Rationalisation
- Growth of workplace technology
- Need to integrate systems
- User outsourcing trends

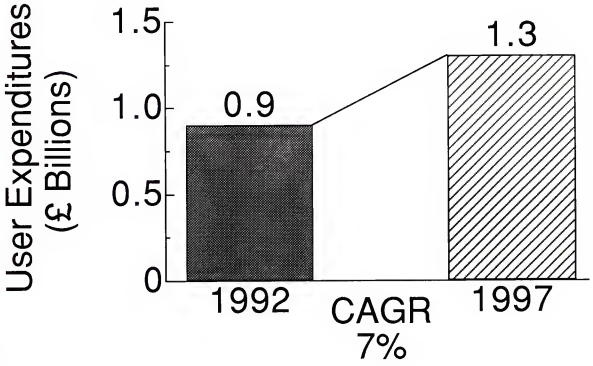
Environmental Services

Market Inhibitors

- Use of in-house resources
- Downsizing
- Lack of user awareness
- Standards—too many/too few

Environmental Services, U.K.

Market Growth



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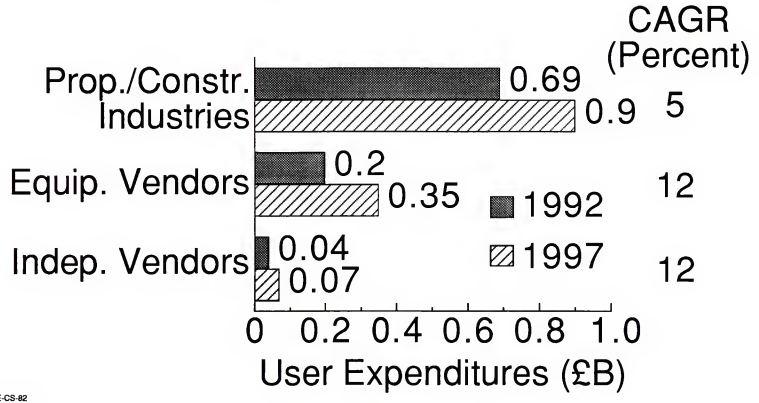
Market Share by Vendor Type



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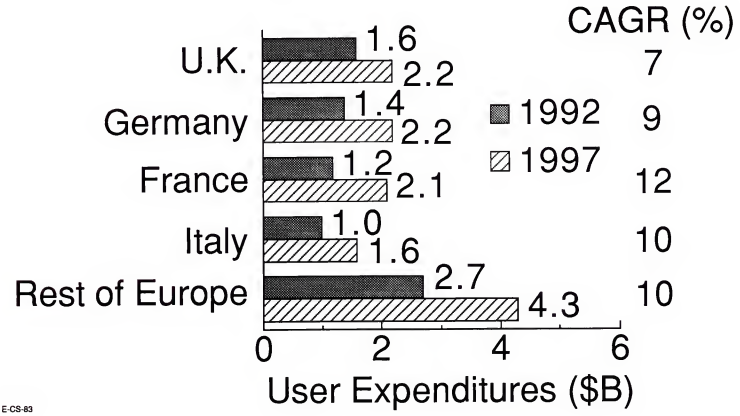
Country Market Growth



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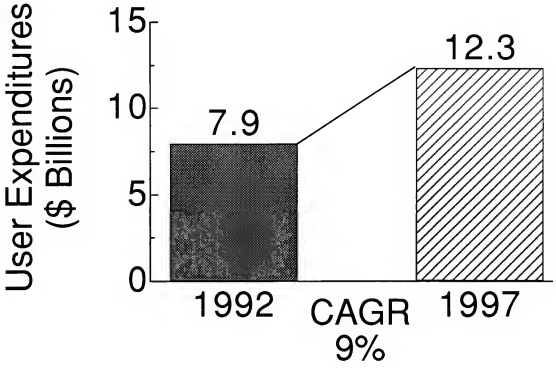
Environmental Services, Western Europe

Market Growth



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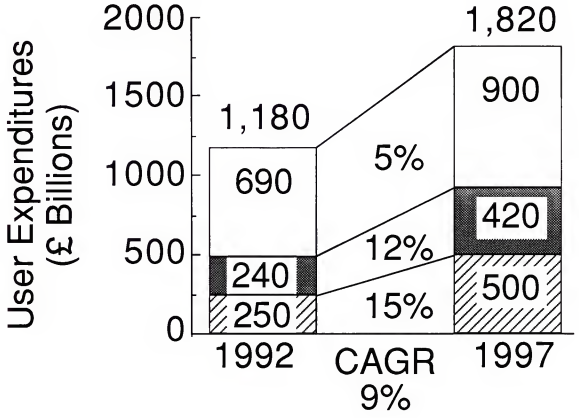
Prof'l and Environmental Svcs.



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Professional and Environmental Services

- Nonenvironmental services (i.e., prof. services) with "industry vendors"
- Environmental services with "industry vendors"
- Environmental services with "non-industry vendors"

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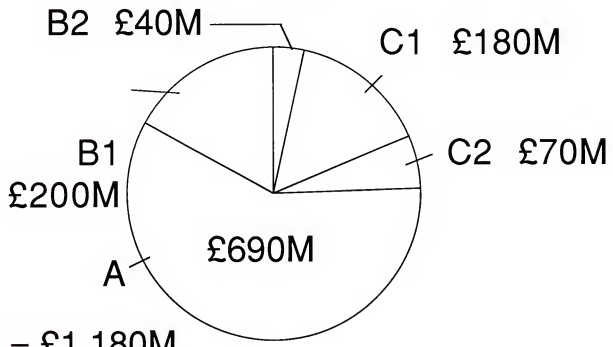
Market Growth by Vendor Type—I



1992
Market = £1,180M

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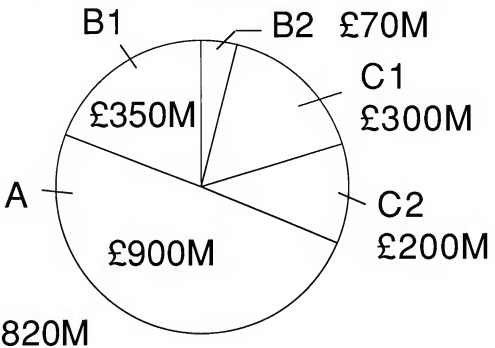
Market Growth by Vendor Type—II



1997
Market = £1,820M

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Opportunities—I

System Range	Users Requiring Vendor Service (Percent)
Large Systems	10
Medium Systems	18
Small Systems	17

Opportunities—II

Country Market	Users Requiring Vendor Service (Percent)	Level of Interest
1. France	24	Medium
2. Germany	31	Low
3. Spain	14	High

Opportunities—III

Industry Sector	Users Requiring Vendor Service (Percent)	Level of Interest
1. Distrib.	25	Medium/High
2. Gov't.	23	High
3. Transp.	21	Medium/Low

Opportunities—IV

Vendor Installed Base	Users Requiring Vendor Service (Percent)	Level of Interest
1. Digital	20	Medium/High
2. IBM	14	Medium/Low
3. HP	15	Low
4. ICL	18	Medium

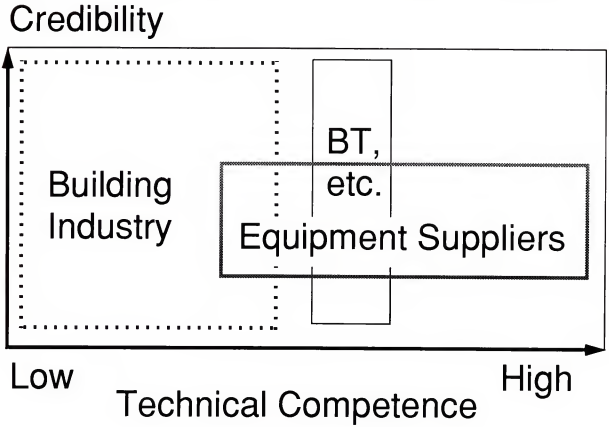
Vendor Perspective

- Building inadequacy
- Workplace technology
- Competitive market
- Fragmented market
- Lack of standards
- User-installable equipment

Primary Opportunities

- One-stop shopping
- Providing the cement
  - Project management
- Productivity

Vendor Positioning



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